

## II. AMENDMENTS TO THE CLAIMS

*Please amend the claims as follows:*

1. (Currently Amended) A customer relationship management (CRM) system that is accessible via a network, comprising:

a user interface that provides distributed access for customers and support providers to case information within the CRM system, wherein the customers and the support providers are separate and distinct institutions; and wherein the user interface provides access to a customer case management page for viewing all cases opened for a given customer and a case summary page for viewing details of individual cases stored within the CRM system; wherein a customer case includes a request from the customer to the support provider for support;

a case management system for managing customer cases, wherein the case management system includes a system for assigning cases to different tiers within a support provider hierarchy; and

a compliance tracking system that retrieves previously loaded customer compliance data from a database; wherein the compliance data consists of information related to whether a customer has met certain required pre-set goals set by the CRM system, compares the compliance data for each customer with predetermined levels to determine customer compliance and provides a compliance indicator on the customer case management page.

2. (Original) The CRM system of claim 1, wherein the case management system further includes a notification system for automatically generating emails when a new case is opened.

3. (Original) The CRM system of claim 1, wherein the case management system further includes a system that allows support providers to check-in/check-out cases.
4. (Original) The CRM system of claim 1, wherein the case management system further includes a set of business rules that determines what level of case information is to be made available to customers and support providers.
5. (Original) The CRM system of claim 1, wherein the case management system further includes a set of business rules that determines how cases are to be assigned and escalated among the different tiers of support providers.
6. (Original) The CRM system of claim 1, wherein the compliance tracking system includes a set of business rules that determines a compliance risk level for each customer.
7. (Original) The CRM system of claim 6, wherein the compliance risk level is selected from the group consisting of: in compliance, in danger of becoming out of compliance, and out of compliance.
8. (Original) The CRM system of claim 7, wherein the compliance indicator comprises a traffic light indicator having a green, yellow and red light.
9. (Original) The CRM system of claim 6, wherein the compliance tracking system includes a system for creating a new customer case when a predetermined compliance risk level occurs.

10. (Currently Amended) A method for providing customer relationship management (CRM) via a computer network, comprising:

providing a network node that allows distributed access for customers and support providers to a CRM system; wherein the customers and the support providers are separate and distinct institutions;

opening a new case within the CRM system when a customer issue occurs; wherein the customer issue includes a request from the customer to the support provider for support;

adding the new case to a customer case management page;

displaying a compliance indicator when the customer case management page is viewed; wherein the compliance indicator is based on information related to whether a customer has met certain required pre-set goals set by the CRM system,

assigning the new case to a first tier support provider;

determining if the first tier support provider can handle the new case; and

escalating the new case to a second tier support provider if the first tier support provider cannot handle the case.

11. (Original) The method of claim 10, wherein the network node comprises a web portal.

12. (Original) The method of claim 10, wherein the compliance indicator determines if the customer is in compliance, at risk of becoming out of compliance, or out of compliance.

13. (Original) The method of claim 10, comprising the further step of generating email notifications according to a set of business rules.

14. (Original) The method of claim 10, comprising the further step of having an assigned support provider check out the case from the CRM system.
15. (Original) The method of claim 10, wherein the step of opening a new case is performed by the customer at the network node.
16. (Original) The method of claim 10, wherein the step of opening a new case is initiated automatically when the customer is out of compliance.
17. (Original) The method of claim 10, wherein the compliance indicator comprises a traffic light indicator having a green, yellow and red light.
18. (Currently Amended) A program product stored on a recordable medium that provides a customer relationship management (CRM) tool via the web, comprising:
- a portal page for providing distributed access on the web for customers and support providers to case information within the CRM tool, wherein the customers and the support providers are separate and distinct institutions; and wherein the portal page provides access to a customer case management page for viewing all cases opened for a given customer and a case summary page for viewing details of individual cases; wherein a customer case includes a request from the customer to the support provider for support;
  - a customer management module for managing customer cases and for assigning cases to different tiers within a support provider hierarchy; and

a customer compliance module that retrieves previously loaded customer compliance data from a database; wherein the compliance data consists of information related to whether a customer has met certain required pre-set goals set by the CRM system, compares the compliance data for each customer with predetermined levels to track customer compliance and displays a compliance indicator on the customer case management page.

19. (Original) The program product of claim 18, wherein the case management module further includes a notification system for automatically generating emails when a new case is opened.

20. (Original) The program product of claim 18, wherein the case management module further includes a system that allows support providers to check-in/check-out cases.

21. (Original) The program product of claim 18, wherein the case management module further includes a set of business rules that determines what level of case information is to be made available to customers and support providers.

22. (Original) The program product of claim 18, wherein the case management module further includes a set of business rules that determines how cases are to be assigned and escalated among the different tiers of support providers.

23. (Original) The program product of claim 18, wherein the compliance tracking module includes a set of business rules that determines a compliance risk level for each customer.

24. (Original) The program product of claim 23, wherein the compliance risk level is selected from the group consisting of: in compliance, in danger of becoming out of compliance, and out of compliance.

25. (Original) The program product of claim 23, wherein the compliance indicator comprises a traffic light indicator having a green, yellow and red light.

26. (Original) The program product of claim 23, wherein the compliance tracking module includes a system for creating a new customer case when a predetermined compliance risk level occurs.